

The Portfolio Service SMSF

Member notice of change of details

Fund name	
Fund reference number	
Member's full name	
Member's account number	

1. Change of member residency status

Please tick relevant box:

- I am no longer a resident of Australia
- I am now a resident of Australia

2. Change of annual pension amount

Please indicate the new payment start date and select the payment amount:

Start date

- Minimum gross amount
- Maximum gross amount (transition to retirement pensions only)
- Other gross amount pa of \$ If you change your pension amount after July of the current financial year, please nominate the gross amount you would like to receive for the **entire** financial year.

3. Change of payment frequency

Please specify the preferred first payment month: Your pension will be paid to your nominated account on the 15th of every:

- Month
- Quarter
- Half-year
- Year

4. Change of financial institution details

Account name			
Financial institution		Branch	
BSB		Account number	

5. Change of address/contact details

New residential address			
Suburb		State	Postcode
Telephone (home)		Telephone (work)	
New email address			

6. Change of name

Member's new full name	
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Please attach proof of name change such as:

- certified copy of marriage certificate/divorce decree, or
- certified deed poll notice showing change of name.

7. Member declaration and signature

I declare that the information provided in this form is true and correct.

Signed by

Name	
Date	

Please return to:

Email: forms@aetlimited.com.au

Fax: 1800 781 166

Or post

**The Portfolio Service SMSF
Administration Services
GPO Box 546
Adelaide SA 5001**